

# 2009 Rider Satisfaction Survey Total Market

Prepared for:

Valley Metro  
Spring 2009



## Executive Summary

This report presents the results of the twelfth Rider Satisfaction Tracking Survey, which was conducted in the Spring of 2009. Data for the 2009 rider satisfaction study were collected using telephone interviews, with a total sample of 717 completed interviews. The overall margin of error for the study is  $\pm 3.7\%$  at the 95% confidence level. It is important to note that this study involved a sample of riders from various routes, but not all routes were represented in the sample. It is also important to note that this year the survey instrument was changed to include information regarding usage and opinions of the light rail system.

### Rider Characteristics

- This year, riders continue to report a longer history of public transit usage, averaging 8.1 years, up from 6.8 years in 2008 and 4.8 years in 2006.
- Approximately one-half (52%) of bus riders report riding the bus at least five days in an average week; this represents a significant decrease from previous Rider Satisfaction studies (62%-68% in prior years).
- Most light rail users (55%) report riding the light rail one day or less in an average week. One in six (17%) indicate they use the train at least five times a week.
- The majority of transit ridership occurs during the week, with nine in 10 riders (90%) reporting they use public transit between Monday and Friday; this represents a significant decrease from the 96% reported in 2008.
- Reported weekend usage slightly increased this year; one-half of riders report using public transit on Saturday (50%; up from 46%) and one in three report using it on Sunday (34%; up from 30%).
- Nearly two-thirds of riders report regular usage during the 6:00 to 9:00 a.m. and 3:00 to 6:00 p.m. time periods (62% and 64%, respectively). This year there is a significant drop in the percentage of riders indicating they ride before 6 a.m. (16%; down from 21%).
- Public transit usage in Phoenix is significantly higher than for any other city named; with 86% of riders stating they use public transit 'most often' in Phoenix. This percentage is slightly higher than findings from 2008 and 2006 when riders were asked about the city they traveled around most often using the *bus* (2008: 82%; 2006: 77%).
- Slightly fewer than two in five riders (39%) do not have a car available to them, even on an occasional basis. This percentage is significantly lower than the 45% reported in 2008.

- Almost three-fourths of transit users surveyed (72%, respectively) have a current, valid driver's license; this is slightly higher than the 67% reported last year. One in four (25%) of riders surveyed have neither a valid license nor a vehicle available to them.

### **Trip Characteristics**

- Riders are most likely to report paying full fare for their transit trips in 2009 (39%); this is slightly lower than report in 2008 (42%).
- When riders were asked how they usually pay for their transit fare, more than three-fifths (62%) report they use a pass and 37% indicate they typically pay cash.
- Among those that use a pass, one in three (34%, respectively) indicate they use a monthly pass, followed closely by 29% reporting they use a platinum pass.
- Riders using a monthly pass or some type of day pass are most likely to purchase their pass at the "transit center" (mentioned by 39%).
- More than one-third of riders indicate they ride Express/Rapid buses and/or Neighborhood Circulators (35% and 37%). Five-percent (5%) of riders report riding Link.
- More riders report using public transit to get to and from work than for any other reason (61%); this percentage, however, is significantly lower than the 70% measured in 2008.
- Three in eight riders (38%) report having to travel ¼ mile or less from home to access a transit stop, and another 14% state that the distance is between ¼ and ½ mile. The combined 52% of riders traveling ½ mile or less to get on public transit is significantly lower than the 58% measured in 2008.
- Thirty-seven percent (37%) of riders indicate they travel at least one mile to access public transit; significantly higher than the 31% measured last year.
- The vast majority (67%) of riders walk to the nearest transit stop, whereas 29% use an automobile (either alone or with others) to reach the transit stop.
- Most riders report that they either do not need to make a transfer on their typical one-way trip (40%) or they only make one transfer (27%).
- About half (49%) of riders indicate they spend between 15 and 44 minutes on public transit on their typical one-way trip; however, one in four riders (25%) report that it usually takes more than an hour for a one-way trip.
- Similar to 2008, the vast majority of riders indicate they walk to their destination at the completion of their trip (92%).

### System Satisfaction Questions

- Bus riders are most likely to be satisfied with the ease of understanding the bus schedule and route information (84% giving a “4” or “5” rating where “5”=“very satisfied”) and the safe driving of the bus driver (82%). Bus riders are least likely to indicate high satisfaction with the availability of bus shelters (49%).
- This year, there is a significant decrease in the percentage of bus riders indicating they are satisfied with the ability to transfer between buses (down 8 percentage points), the value of service for fare paid (down 7 points), the online trip planner (down 7 points), and the service available to places they need to go (down 6 points).
- The vast majority of light rail riders are most likely to be satisfied with the *cleanliness of the train* (94% giving a “4” or “5” rating where “5”=“very satisfied”). The *comfort level* of the passengers on the train, *on-time performance*, *feeling of safety*, and *value of service* round out the top five elements with the highest satisfaction (89%-88% giving a “4” or “5” rating).
- Light rail riders are least likely to indicate high satisfaction with the *availability of schedule information* (75%). In addition, those that ride the bus and light rail are least likely to be satisfied with the *ability to transfer between the bus and the light rail* (79%).

Currently, 70% of transit riders indicate a high level of overall satisfaction with public transit in the Valley, essentially the same percentage as measured in 2008 (69%). More importantly, however, there is a significant increase in the percentage of riders indicating they are “very satisfied” with public transit service (28%; up from 23% in 2008).

- The most common reason given among those satisfied with the transit system (i.e., gave a “4” or “5” rating) is its frequency/reliability (16% mentions). In addition 16% of riders indicate they are satisfied with transit service in general.
- The most cited reason for not being satisfied with public transit service is the lack of transit in early/late hours (infrequency in general). One in five of those who gave a “1” to “3” rating said this was the reason why (22%). An additional 12% of riders indicate that there needs to be more routes.
- Four in five transit users indicate they are highly likely to recommend public transit service to other people (80%); slightly higher than the 76% measured in 2008. In fact, more than half report they are “very likely” to recommend the service, a significant increase from the previous year (56%; up from 49%).
- Four in five transit users (79%) also indicate they are highly likely to be riding public transit one year from now, with 64% indicating they are “very likely.” The percentage of riders reporting they are “very likely” to use transit one year from now is significantly higher than the 58% reported in 2008.

## Loyalty Segments

As in 2008, five different loyalty segments were identified using rider answers to three questions: *Overall satisfaction with the bus system in the Valley, likelihood to recommend the bus service, and likelihood to be riding the bus one year from now.*

- Slightly more than one in five transit users are **Loyal Advocates** (22%; up from 17% in 2008). Loyal Advocates give the highest rating on all three measures – overall satisfaction, likelihood to recommend and likelihood to be using public transit in one year. This group of riders is comprised of older, female riders who use transit almost on a daily basis to travel to multiple locations around the Valley.
- Slightly less than two in five transit users are **Secure** riders (37% down from 41% in 2008). Secure riders are those who are both satisfied and likely to be using transit in one year, but express somewhat less satisfaction and likelihood than Loyal Advocates. This group of riders appears to be primarily choice riders who use transit for their work commute.
- One if five transit users are categorized as **Vulnerable Captive** riders (20%). Riders classified as “Vulnerable Captives” are those who are not satisfied with the system overall but indicate they are likely to be using transit in one year. This group of riders tends to be older, males who are using public transit to commute to work, however, despite a higher than average income the lack of easy access to a vehicle appears to be a significant factor. It would seem that if a vehicle would become available to them for the work commute, they would be likely to stop using transit.
- Approximately one in ten transit users are categorized as **Vulnerable Satisfied** riders (11%). Vulnerable Satisfied riders are those who are satisfied with the bus system overall, but are unlikely to be riding the bus in one year. This group of riders are primarily younger riders who are students using transit to get to school or work. They use transit regularly, but not daily and not much on the weekends. They appear to have inconsistent access to a vehicle and use public transit only when they have to. Although transit appears to be meeting their needs currently, it is likely they see this as a temporary situation that will change once they are out of school.
- Finally one in ten transit users are **At Risk** riders (10%). At Risk riders are those who are neither satisfied with the bus service in the Valley nor likely to be riding the bus one year from now. These riders appear to be younger, females, minority residents, who are using transit when they need to travel around the Valley. Many have children in the household and they are not necessarily frequent transit users, but their trips can be lengthy as they get around the Valley. Consequently, transit is not their first choice as a mode of transportation and they appear to be hopeful that their situation will improve in a year and they will not need to continue using transit in the future.

## Route Information and Assistance

- Riders most frequently indicate that their primary source for information about public transit is the Bus Book (mentioned by 63%); however, there is a significant decline in mentions this year (down 7 points from 70% in 2008). Conversely, the Internet, the second most popular source of information experienced a significant increase in mentions (59%; up from 49% in 2008), with two in seven riders reporting they go directly to the Valley Metro website (28%; down from 32% in 2008).

## Conclusions

1. In general, satisfaction among transit users in the Valley appears to have remained fairly steady in comparison with 2008 measures. Key increases, however, were observed in the percentage of riders indicating they are “very satisfied” with the bus service, “very likely” to recommend the service to others and “very likely” to use the service in one year. This means that at least some riders believe the system has improved over the past year and has become more user-friendly from their perspective.
2. A significant proportion of bus riders have now become “system users” who are taking advantage of the various public transit options available – light rail, express/RAPID buses, neighborhood circulators and the LINK. There appear to significant demographic differences between light rail *only* riders and transit users who combine city bus and light rail service; however, there is a lot of overlapping usage between the two systems and it is important to realize that many residents who historically have been characterized fitting the demographic profile of “bus riders” are now also light rail users.
3. Although riders are still heavily dependent on the Transit Book, the use of and access to the Internet continues to increase – particularly among newer users.
4. Finally, there were several shifts in the demographic attributes of the transit users as well as in overall usage attributes. It is difficult to pinpoint one explanation for the changes – there were service changes that occurred (service cuts as well as the addition of light rail service), a difficult economy changing commute behaviors, and we used a telephone data base of riders that is two years old. Hopefully, some of these attributes will stabilize over the next year and we will return to a mixed-methodology of telephone and in-person intercepts and we will be able to have a clearer grasp on the identity and profile of transit users.